### Team Pulse Check Worksheet

**Purpose:** Quick diagnostic to assess team stability and identify support needs during transitions

**Frequency:** Weekly during active transitions, bi-weekly during stable periods

**Time Required:** 10-15 minutes to complete, 5 minutes per team member

#### Instructions

* Complete this assessment based on your observations and interactions over the past week
* Use a scale of 1-5 where :
  + 1 = Significant Concern
  + 3 = Neutral/Stable
  + 5 = Strong/Positive
* Focus on changes from baseline behavior, not absolute performance
* Follow up on any scores of 2 or below within 24 hours

#### Overall Team Climate

##### General Atmosphere (Rate 1-5)

|  |  |
| --- | --- |
| Area Observed | Rating (1-5) |
| **Current team morale**: |  |
| **Collaboration quality:** |  |
| **Communication openness:** |  |
| **Focus/productivity:** |  |
| **Stress levels:** |  |

##### Observable Behaviors (Check all that apply)

[ ] Increased informal conversations about changes

[ ] More questions about job security or future direction

[ ] Changes in usual work patterns or routines

[ ] Decreased participation in meetings or discussions

[ ] More conflict or tension between team members

[ ] Increased sick days or time off requests

[ ] Changes in typical humor or social interactions

[ ] More frequent requests for clarification on priorities

#### Individual Team Member Assessment

**Team Member:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Date:** \_\_\_\_\_\_\_\_\_\_\_\_\_

##### Performance Indicators (Rate 1-5)

|  |  |
| --- | --- |
| Area Observed | Rating (1-5) |
| **Work quality:** |  |
| **Meeting deadlines:** |  |
| **Initiative/proactivity:** |  |
| **Collaboration with others:** |  |

##### Engagement Indicators (Rate 1-5)

|  |  |
| --- | --- |
| Area Observed | Rating (1-5) |
| **Participation in meetings:** |  |
| **Communication frequency:** |  |
| **Receptiveness to feedback:** |  |
| **Enthusiasm for projects:** |  |

##### Stress/Adaptation Indicators (Rate 1-5)

|  |  |
| --- | --- |
| Area Observed | Rating (1-5) |
| **Apparent stress level:** |  |
| **Adaptability to changes:** |  |
| **Problem-solving approach:** |  |
| **Overall resilience:** |  |

##### Specific Observations

**Changes in behavior noticed:**

**Concerns expressed (direct or indirect):**

**Strengths/positive adaptations observed:**

##### Support Level Needed

[ ] **Green** - Performing well, minimal support needed

[ ] **Yellow** - Some concerns, increased check-ins recommended

[ ] **Red** - Significant concerns, immediate attention required

#### Team-Wide Patterns

##### Emerging Themes (Check all that apply)

[ ] Uncertainty about role changes or job security

[ ] Confusion about new processes or expectations

[ ] Concerns about workload or resource availability

[ ] Questions about leadership decisions or direction

[ ] Interpersonal conflicts or communication breakdowns

[ ] Technical or system-related frustrations

[ ] Work-life balance challenges

[ ] Career development or advancement concerns

##### Communication Gaps Identified

**What information does the team need most?**

**What rumors or misconceptions need addressing?**

#### Action Planning

##### Immediate Actions (Next 24-48 Hours)

**Individuals requiring follow-up:**

|  |  |
| --- | --- |
| Name | Action |
|  |  |
|  |  |
|  |  |

##### Short-term Actions (Next 1-2 Weeks)

**Team-level interventions needed:**

[ ] Team meeting to address specific concerns

[ ] Additional communication from leadership

[ ] Process clarification or training

[ ] Resource or support adjustments

[ ] Conflict resolution or mediation

[ ] Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

##### Escalation Required

**Issues to raise with leadership:**

**Support needed from HR or other departments:**

##### Tracking Over Time

**Previous Assessment Comparison**

**Date of last assessment:** \_\_\_\_\_\_\_\_\_\_\_\_\_

**Overall trend:** [ ] Improving [ ] Stable [ ] Declining

**Key changes since last assessment:**

##### Success Indicators to Monitor

[ ] Decreased stress-related behaviors

[ ] Improved participation in meetings

[ ] Reduced questions about job security

[ ] Increased collaboration and teamwork

[ ] Return to normal productivity levels

[ ] Positive feedback about communication

[ ] Reduced conflict or tension

#### Notes & Reflection

**What's working well in supporting the team?**

**What support strategies should be adjusted?**

**Key insights or patterns noticed:**

**Follow-Up Actions Completed**

|  |  |  |  |
| --- | --- | --- | --- |
| Date | Action Taken | Team Member | Outcome |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**Next Assessment Date:** \_\_\_\_\_\_\_\_\_\_\_\_\_

**Completed by:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Date:** \_\_\_\_\_\_\_\_\_\_\_\_\_